

Condor Capital Client Portal Overview

Executive Summary

Condor Capital has developed a brand-new portal for its clients. The new portal is designed with the latest web technologies and implements best-in-breed security & design principles to deliver a robust, mobile-friendly, and secure experience for users. The new portal is found at a new URL (<https://portal.condorcapital.com>) and provides improved account reporting and statement retrieval capabilities, a new secure messages feature to securely send/receive messages to/from Condor Capital, and will continue to be built up with new features to better serve our clients.

Accessing the Portal

Clients may access the portal by navigating their web-browser to <https://portal.condorcapital.com>. The portal was designed with newer web technologies that require relatively recent browser versions to use properly. We recommend keeping your browsers up-to-date and specifically recommend using Google's Chrome web browser for an optimal web experience, though newer versions of Safari, FireFox, and Edge are also fully supported.

When browsing the portal page, you will first be prompted to login:



The image shows a login form for Condor Capital. At the top, there is a black header with a gold house icon on the left and the text "Condor Capital" in a large, white, serif font, with "WEALTH MANAGEMENT" in a smaller, white, sans-serif font below it. Below the header, there are two white input fields with thin grey borders. The first is labeled "Username" and contains the placeholder text "Username". The second is labeled "Password" and contains the placeholder text "Password". Below these fields is a wide, light grey button with the text "LOG IN" in a dark grey, sans-serif font.

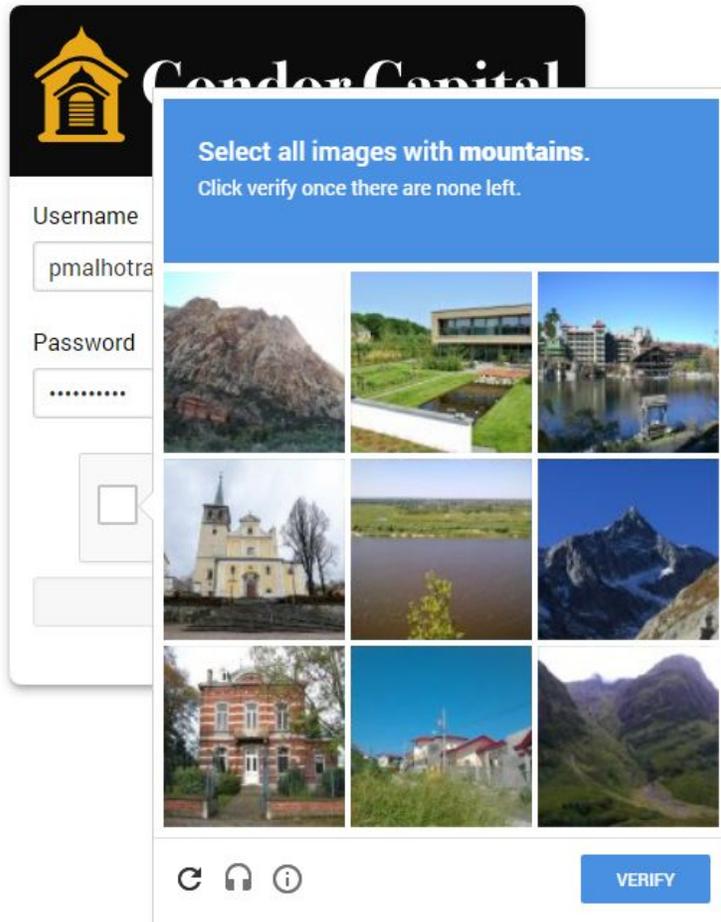
You will use your Condor-supplied username and password to log in to the portal. If you forgot your username and/or password, please reach out to Condor to have it reset. We implement

security measures to deter hackers, which means that you will occasionally be shown a reCAPTCHA box to login to your account as shown:



The image shows a login form for Condor Capital Wealth Management. At the top, there is a black header with the Condor Capital logo (a yellow house icon) and the text "Condor Capital WEALTH MANAGEMENT". Below the header, the form has a white background. It contains a "Username" label above a text input field with the placeholder text "Username". Below that is a "Password" label above a text input field with the placeholder text "Password". Under the password field is a reCAPTCHA widget consisting of a checkbox, the text "I'm not a robot", and the reCAPTCHA logo with the text "reCAPTCHA Privacy - Terms". At the bottom of the form is a large, light gray button labeled "LOG IN".

Simply press the checkbox shown to continue attempting to log in. On occasion, the reCAPTCHA service will ask for further validation such as identifying objects in pictures - e.g. you will be shown a variety of pictures and will be asked to select all pictures depicting mountains:



After logging in successfully and if you have enabled two-factor authentication on your account, you will be prompted to enter a One Time Password to finish logging in:

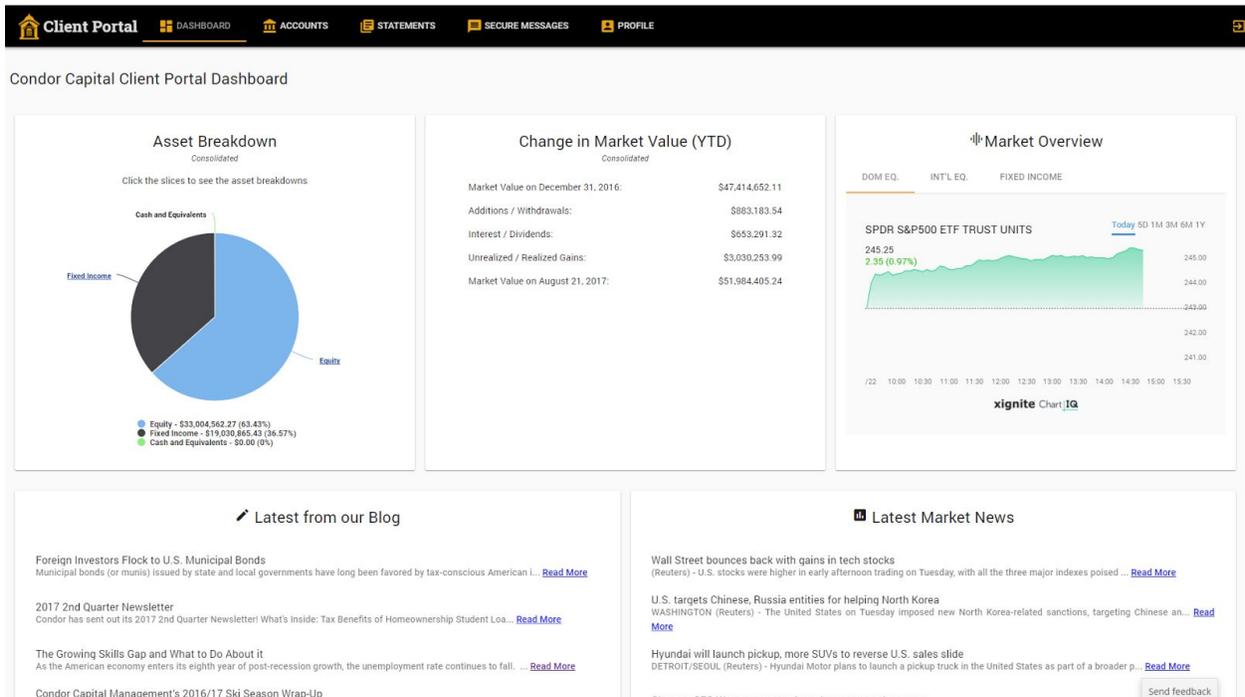


You can either set up text passwords and/or use an authenticator app on your smartphone such as Google Authenticator. Please reach out to Condor for further information on how to enable these features and get started with them. If you have both the authenticator app and text notifications set up, you will be asked to use the app first but may click on the link shown at the bottom to receive a text to your phone instead.

Each logged-in session can last a maximum of 4 hours and will be automatically logged out after 15-minutes of being idle.

Portal Dashboard

The first page you will see upon entering the Client Portal is the dashboard page. Here you will be shown a consolidated view of your accounts, a brief market overview, and latest news entries from our blog and various news sources.



Every page of the portal after you've logged in will have the navigation bar found at the top of the page. On tablet/mobile devices, the icons may only be displayed or only the menu option will be available.

Tablet View:



Mobile View:



From here, you may navigate to other sections of the portal: Accounts, Statements, Secure Messages, Profile, or Logout

Accounts section

The Accounts section starts with a list of your accounts:

The screenshot shows the 'Accounts' section of the Client Portal. At the top, there is a navigation bar with 'Client Portal' and icons for Dashboard, Accounts, Statements, Secure Messages, and Profile. Below the navigation bar, there is a breadcrumb 'Accounts > Switch Account' and a section titled 'Account Summary'. The 'As of' date is set to 3/9/2017, and there is an 'EXPORT' button. Below this, there is a table with two columns: 'Account Name' and 'Market Value'. The table contains one row for a redacted account name with a market value of \$21,150.37, and a final row for 'Consolidated Portfolio Value' with a market value of \$21,150.37.

Account Name	Market Value
[REDACTED]	\$21,150.37
Consolidated Portfolio Value	\$21,150.37

From here, you may click on any account to drill down to more information or click on the “Consolidated” line to view more information at a consolidated level. You may also navigate to accounts using the “Switch Account” dropdown underneath the main navigation bar. You can also export the current view of accounts to text or Excel and change the date to report on.

Upon clicking on an account line, you will be brought to the “Overview” page for that account.:

The screenshot shows the 'Overview' page for a consolidated account. At the top, there is a navigation bar with 'Client Portal' and icons for Dashboard, Accounts, Statements, Secure Messages, and Profile. Below the navigation bar, there is a breadcrumb 'Accounts > Consolidated' and a section titled 'Consolidated'. The 'Market Value' is \$21,150.36 (As of March 9, 2017). Below this, there is a horizontal menu with tabs for OVERVIEW, UNREALIZED GAIN/LOSS, REALIZED GAIN/LOSS, PURCHASE & SALE, PERFORMANCE, and PERFORMANCE HISTORY. The 'OVERVIEW' tab is currently selected.

Here you can switch to the different report tabs shown or scroll down to the Portfolio Appraisal report:

Portfolio Appraisal			
As of:	<input type="text" value="3/9/2017"/>	<input type="button" value="EXPORT"/>	
EXPAND ALL / COLLAPSE ALL			
Security Name	Price	Market Value	% Assets
+ Funds			
	+ Funds Total:	\$20,620.79	97.49%
+ Cash and Equivalents			
	+ Cash and Equivalents Total:	\$529.57	2.50%
+ Portfolio Total:		\$21,150.36	100.00%

As with the initial account view page, you have the option to change the reporting date and/or export the data to text or Excel. Initially, all reports will be displayed in a collapsed view as shown, and you may expand parts of the report you would like more information on, or click on the “Expand All” button to expand all parts of the report. All reports have an export option available and the ability to “Expand/Collapse All”.

Here is additional information on each report:

- Overview - This is the standard Portfolio Appraisal report. It shows your account value and holdings as of the chosen report date. You may select any date since the account’s opening to the latest reporting date available.
- Unrealized Gain/Loss - This is the unrealized gain/loss report. You cannot adjust the reporting date on this report.
- Realized Gain/loss - This is the realized gain/loss report. It takes both a start and end date where the start date can go back as far as the account open date. This report is only available on taxable accounts.
- Purchase & Sale - This report will display any Purchases, Sales, and Reinvested Dividends that occurred for the selected account between the start and end dates chosen. Any start date since the opening of the account may be selected.
- Performance - This is the Performance by Asset Class report. You may only run the report up to 1 year back. Please read and understand the disclaimer on this report for more information on it. It takes a start and end date. The “Show Additional Fields” option will display additional information available from this report.
- Performance History - This is the Performance History report. It runs for the start/end dates chosen, which must be end of month dates. The start date can go as far back as the last day of the month that the account was opened in. The “Show Monthly Breakdown” checkbox will enable showing the monthly performance numbers between the dates chosen.

Statements section

This part of the portal can be used to download Custodian and Condor statements. Condor statements are the quarterly invoices generated every three months, and Custodial statements are the monthly statements available from the custodians. Currently, the only Custodial statements available through the portal are Schwab and TD.

Secure Messages section

This is one of the new features of Condor's Client Portal. From here, you can securely message Condor and include attachments of up to 500MB in size.